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The Future Market of Chinese New Energy Vehicles The Transformation and Development of DongFeng

Mr. Chen Li

Dongfeng Motor Corporation
Director of Dongfeng moto New Energy Automotive
Industry Management Dept.

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CHINA'S NEV MARKET PERFORMANCE

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CHINA'S NEV MARKET TRENDS

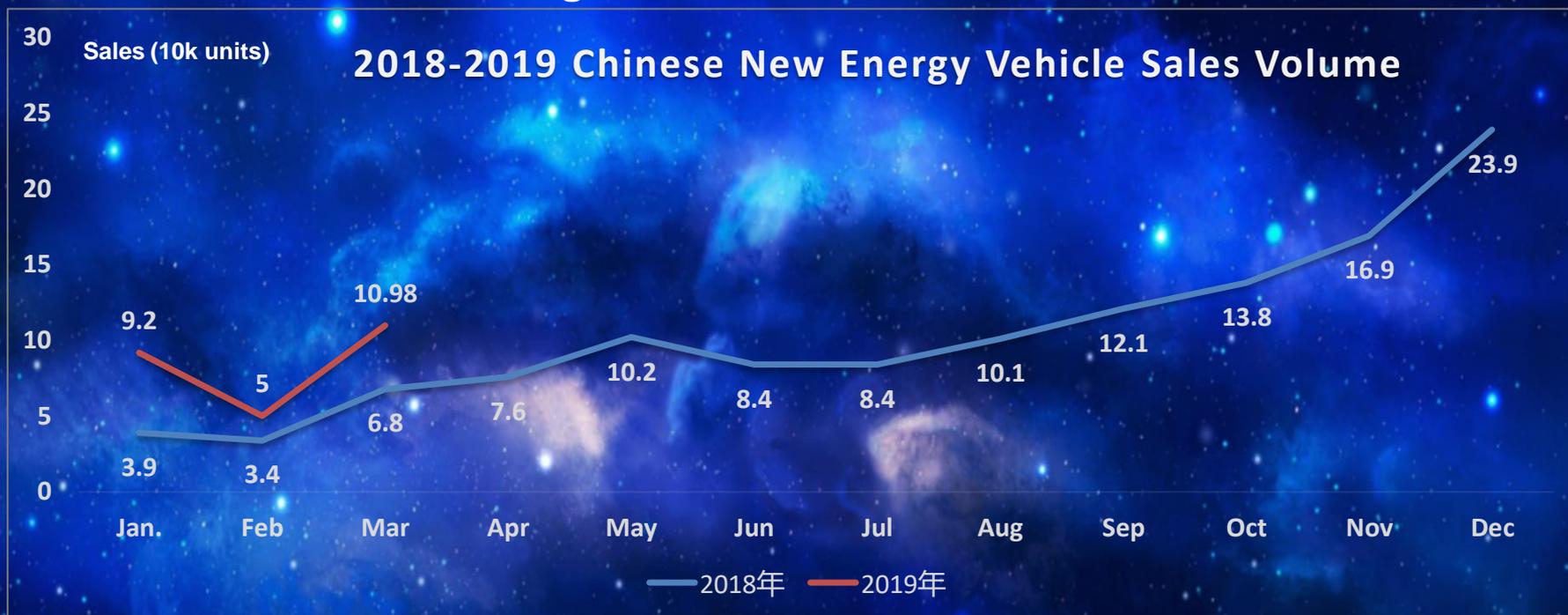
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DONGFENG'S TRANSFORMATION AND
DEVELOPMENT



NEV SALES in 2018/2019

- ❑ The NEV sales volume has reached a historical peak level in March 2019. BEV market share got further enhanced.

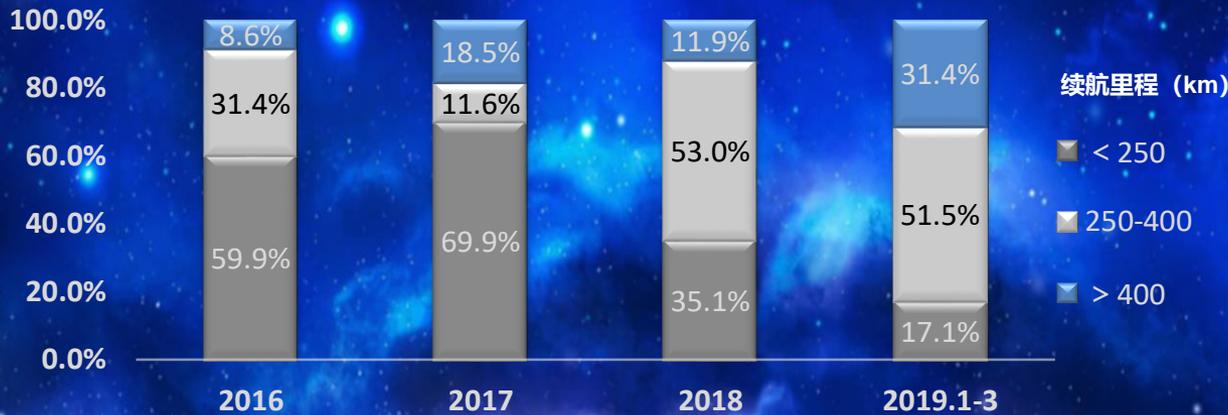


Sales Structure	2018	2019.1	2019.2	2019.3	2019 First Quarter
Total sales	125.5	9.2	5.0	10.98	25.18
BEV Ratio	78%	79%	76%	80%	79%
PHEV Ratio	22%	21%	24%	20%	21%

PERFORMANCE TREND OF NEW ENERGY VEHICLE MARKET



2016-2019 Range Distribution of BEV



2017-2019 Energy Density variation tendency



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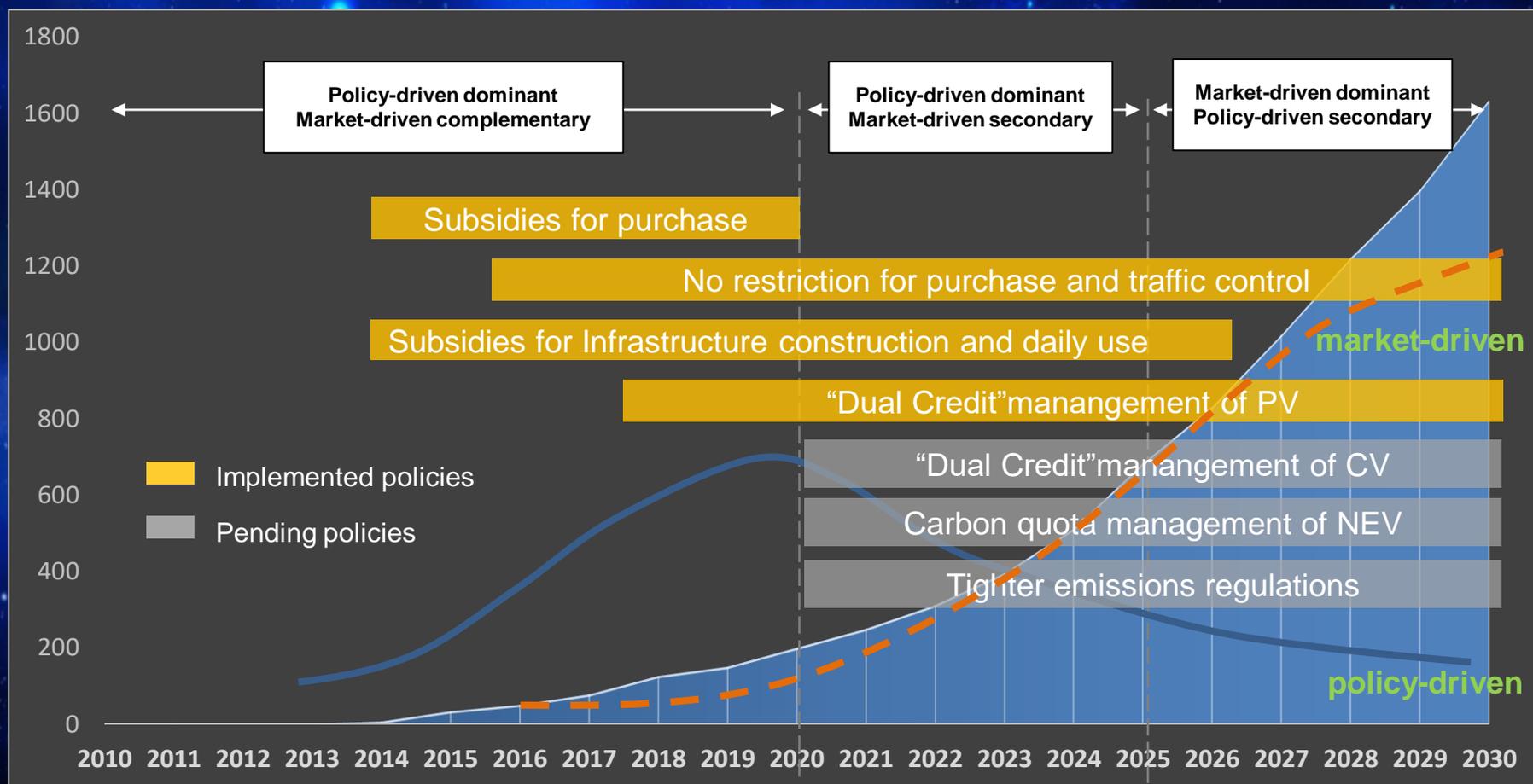
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DONGFENG'S TRANSFORMATION AND
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GOVERNMENT POLICY AFFECTS THE NEV MARKET

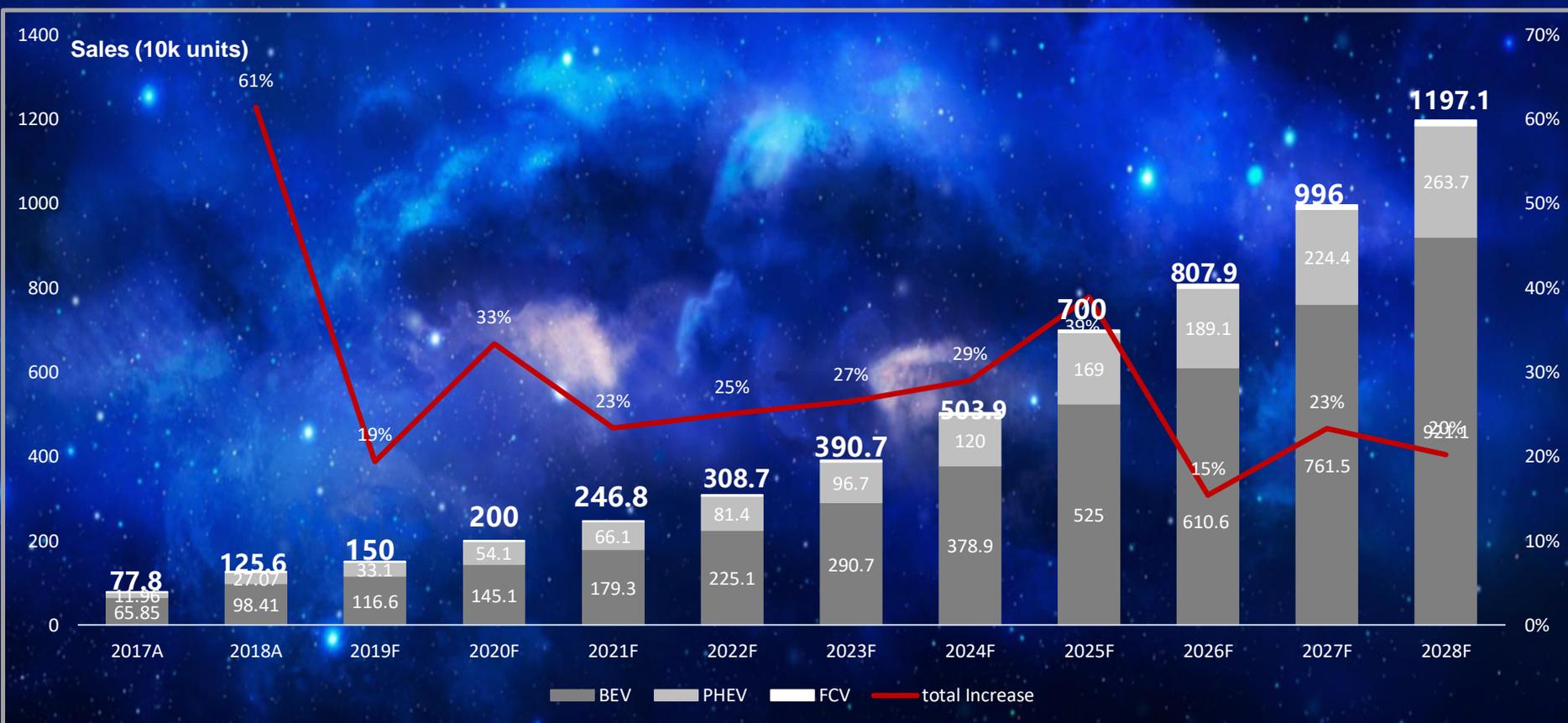
■ Policies are important driving force of China's NEV market



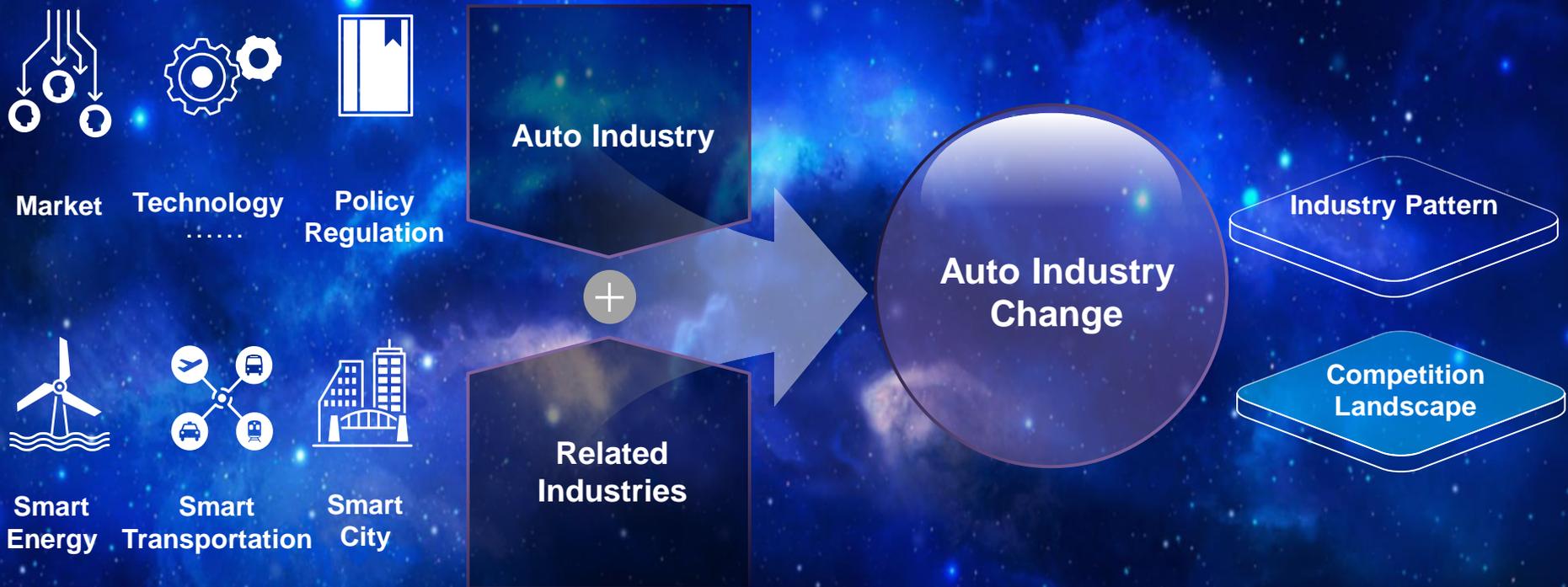


TIV FOR CHINESE NEV MARKET

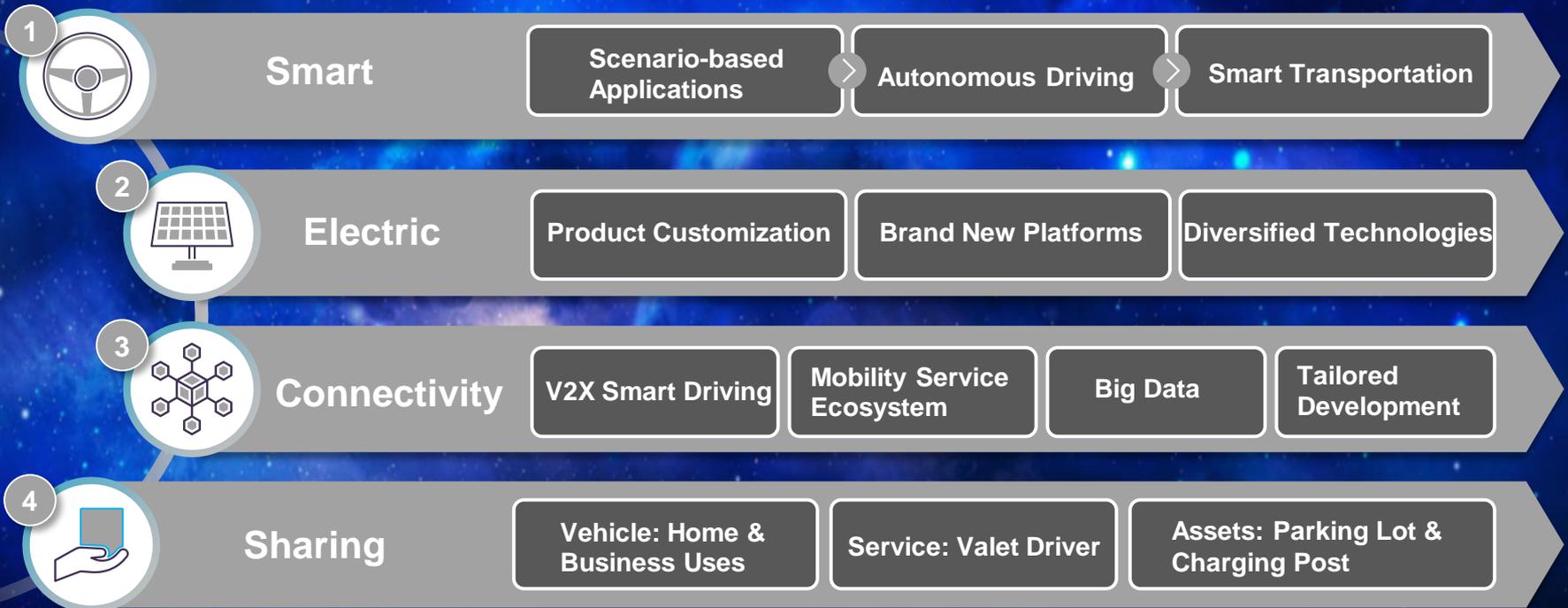
□ In the next 10 years, the electric vehicle will become the main growth force of the automobile market, and BEV is the mainstream.



AUTO INDUSTRY IS UNDERGOING PROFOUND CHANGES



TECHNOLOGICAL DEVELOPMENT BUILDS NEW INDUSTRY PATTERN





DIVERSIFIED PARTICIPANTS IS RESHAPING THE INDUSTRY COMPETITION LANDSCAPE



1

Core Competence

Ultimate Product

Chain Chain Integration

2

Core Platform

Customer Interface

3

Core Asset

Data



DIFFERENTIATION OF USER DEMAND

❑ Differentiated needs of enterprise users are increasingly prominent. In the post-subsidy era, it is necessary to build differentiated models to satisfy both enterprise and private users



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DONGFENG SALES VOLUME

□ Dongfeng's NEV sales volume is expected to reach 300,000 units by 2020 , and break through 800,000 units by 2023



GRASPING THE OPPORTUNITIES OF ENERGY-SAVING AND NEW ENERGY VEHICLE



1

Core Resources

Battery, Motor, BMS base – basically completed;
Fuel cell base – under construction



1. Electronic control system manufacture
2. Electric drive R&D and manufacture
3. Battery manufacture
4. Powertrain D&D and validation
5. IGBT packaging



1. NEV D&D center
2. Validation center
3. Fuel cell manufacture
4. Trial-manufacture
5. IGBT packaging
6. Hydrogen refueling and storage station
7. E-Motor and E-Drive assembly manufacture

GRASPING THE OPPORTUNITIES OF ENERGY-SAVING AND NEW ENERGY VEHICLE



2

Key Technologies

Developing platform,
modular core assemblies
Shared components for use
on both PV and CV
High energy-density battery
system
New Fuel Cell powertrain is
under development



Integrated EDU
(Electric Drive Unit)

Power Battery System



Fuel Cell Powertrain
System



GRASPING THE OPPORTUNITIES OF ENERGY-SAVING AND NEW ENERGY VEHICLE

3

Products

More NEV PVs and CVs
launched
Automation and
Connectivity on full range
products



BEV & PHEV PV

The range of Aeilus E70 has reached 400km, and updating model will be more than 500km.

NEV CV

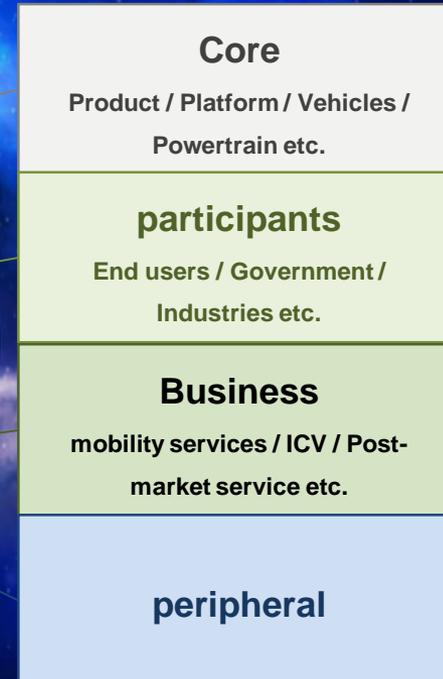
NEV products including hundreds of FCV have been used in commercial field covered China

GRASPING THE OPPORTUNITIES OF ENERGY-SAVING AND NEW ENERGY VEHICLE



4

Building Ecosphere



Core
Product / Platform / Vehicles / Powertrain etc.
Focus on key technologies and core resources

participants
End users / Government / Industries etc.
Focus on user needs and regulations

Business
mobility services / ICV / Post-market service etc.
Focus on ICV and services

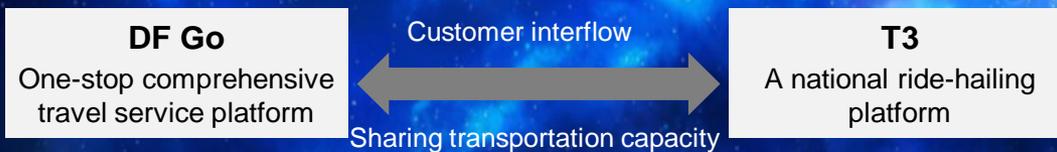
peripheral
Help green and beautiful life

STRENGTHEN INDUSTRIAL COOPERATION AND JOINTLY PROMOTE INDUSTRIAL CHANGE

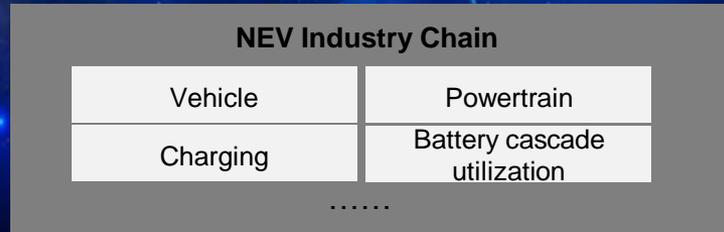
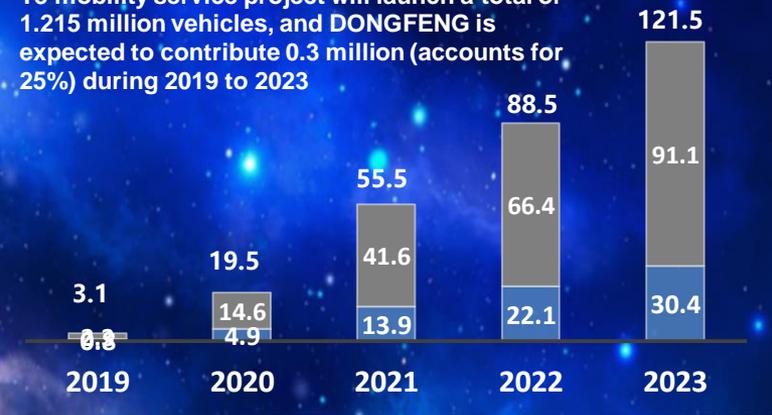


T3 and DF Go integration development

➤ Business collaboration



T3 mobility service project will launch a total of 1.215 million vehicles, and DONGFENG is expected to contribute 0.3 million (accounts for 25%) during 2019 to 2023



谋远、开放、主导、创新、突破



谢谢聆听！
THANK YOU